

**Bid Pack**

**Attachment 3 – Statement of Requirements**

**Contract Reference:** CCS Triage Lead to Cabinet Office Digital Provision of Data Visualisation Tool

**Procurement / Contract Title**: CO Digital 20 - Tableau Service Procurement

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# PURPOSE AND OVERVIEW OF THE REQUIREMENT

* 1. [This bid is for the procurement of Tableau Data Visualisation tool so that departments in the Cabinet Office can continue to use Tableau to meet their data visualisation needs. Cabinet Office runs a Tableau shared service to reduce costs, accelerate adoption and connect people within the Cabinet Office so that knowledge can be shared across business units.](https://docs.google.com/document/d/1_xclnog8A8dlPVSegoSkvhUx4c8IA6uC/edit#heading=h.2et92p0)
	2. [A key tenet of the Data Strategy within the Cabinet Office is to provide access to data so that it is readily available and can be used by colleagues to aid decision making. By providing the Tableau Shared Service we aim to “democratise data” and in doing so accelerate data visualisation across the Cabinet Office.](https://docs.google.com/document/d/1_xclnog8A8dlPVSegoSkvhUx4c8IA6uC/edit#heading=h.s4078mjg6053)
	3. [Mission 3 of the Government Data Strategy involves harnessing data to make government more efficient and to offer better public services. The Cabinet Office Tableau shared service supports mission 3 of the Government Data Strategy. https://www.gov.uk/government/publications/uk-national-data-strategy/national-data-strategy](https://docs.google.com/document/d/1_xclnog8A8dlPVSegoSkvhUx4c8IA6uC/edit#heading=h.8xazn9ovn9z4)

# BACKGROUND TO THE BUYER

* 1. [The Cabinet Office supports the Prime Minister and ensures the effective running of government. We are also the corporate headquarters for the government, in partnership with HM Treasury, and we take the lead in certain critical policy areas.](#_heading=)
	2. [The Cabinet Office is Responsible for](https://docs.google.com/document/d/1_xclnog8A8dlPVSegoSkvhUx4c8IA6uC/edit#heading=h.ejhbt8qwhy9o) [supporting collective government, helping to ensure the effective development, coordination and implementation of policy.](#_heading=)
	3. S[upporting the National Security Council and the Joint Intelligence Organisation, coordinating the government’s response to crises and managing the UK’s cyber security](#_heading=)
	4. P[romoting efficiency and reform across government through innovation, better procurement and project management, and by transforming the delivery of services.](#_heading=)
	5. P[romoting the release of government data, and making the way government works more transparent](#_heading=)
	6. C[reating an exceptional Civil Service, improving its capability and effectiveness](#_heading=)
	7. P[olitical and constitutional reform](#_heading=)

# BACKGROUND TO THE REQUIREMENT

* 1. [Cabinet Office business units use Tableau today as a tool for presenting, analysing and sharing data with their stakeholders. Departments would not be able to continue their normal operations without continuing access to Tableau.](https://docs.google.com/document/d/1_xclnog8A8dlPVSegoSkvhUx4c8IA6uC/edit#heading=h.rlnsp41x3kz9)
	2. [Tableau is a strategically important Data Visualisation Tool and it is not practical or desirable at this time to migrate to another competitor tool. Moving to another tool would be expensive, requiring redevelopment work of Tableau assets (data sources, workbooks, reports and dashboards), staff retraining and knowledge building.](https://docs.google.com/document/d/1_xclnog8A8dlPVSegoSkvhUx4c8IA6uC/edit#heading=h.1t3h5sf)
	3. [The provision of the Tableau shared service is in support of The Government Data Strategy mission 3, the Tory Party Manifesto from the last election committing to improve government through the better use of Data and the Cabinet Office Strategy to improve efficiency through the use of data.](#_heading=)

# DEFINITIONS

|  |  |
| --- | --- |
| Expression or Acronym | Definition |
| [Tableau Creator](#_heading=) | [The Creator licence is designed for users who create content. This can include the design, cleaning and curation of data sources, which others will use to analyse governed data, or the creation of visualisations and dashboards with which other users will interact. It also includes designing governance and permissions models that control which information users may find.](#_heading=) |
| [Tableau Viewer](#_heading=) | [Tableau Viewers can view and interact with published visualisations and dashboards. These users can be given permission to access published content and interact with guided drill paths and filters. They can also subscribe to dashboards to get periodic updates and receive data-driven alerts.](#_heading=) |
| [Tableau Server](#_heading=) | [Tableau Server is the software required to run a multi-user environment to host and manage Tableau data sources, workbooks, reports, and dashboards in a private cloud environment.](#_heading=) |
| [Tableau Data Management Option](#_heading=) | [A collection of features including Virtual Connections that allow the secure sharing of data sources between Tableau users.](#_heading=) |
| IPA | Infrastructure and Project Authority |
| IBCA | Infected Blood Compensation Authority |
| Sitsen | Situation Centre |
| CDIO | Central Data Information Office |

# SCOPE OF THE REQUIREMENT

## [To provide Tableau Creator and Viewer licences to be used for development and hosting of Tableau assets including data sources, workbooks, reports and dashboards.](#_heading=)

* 1. To provide additional Tableau Servers if required.
	2. To provide Tableau licences to be used for development, interrogation of business data and hosting of Tableau assets including data sources, workbooks, reports and dashboards.
	3. To provide solution engineers available for technical support when required.
	4. To provide knowledge sharing options (training, webinars and support).

# MANDATORY DELIVERABLES (SUPPLIER RESPONSIBILITIES)

## To provide Tableau Creator and Viewer licences to be used for development and hosting of Tableau assets including data sources, workbooks, reports and dashboards.

* 1. To provide two core based (8 physical cores) Tableau Server License, to be used by the GBS GRID team and IBCA.
	2. To provide the Tableau Data Management option.
	3. To provide the multi-site Tableau Online option to support at least 4 Cabinet Office Tableau Online Sites.
	4. Option to add an additional Core-based Tableau Server License when required.
	5. Option to add a 1 year extension under the agreed terms.

## Supplier to run a monthly service review to include

* + 1. Report showing licence usages by Tableau site
		2. Financial report
		3. Summary of support tickets and actions taken
		4. User sentiment review
		5. Stakeholder sentiment review

## Option to add another 1 x Core-based Tableau Server (8 Physical Cores)

## Option to extend on the agreed terms for 3 months

* 1. Contract Start Date: 26-Jul-2025, Contract End Date: 31-Mar-2027
	2. Procure Tableau products and services on a 12 month term as follows

|  |  |
| --- | --- |
| **Order Details** | **Quantity** |
| Tableau Creator Licence | 197 |
| Tableau Creator Server Licence (embedded) | 70 |
| Tableau Viewer Licence | 1172 |
| 2 x Core-based Tableau Server (8 Physical Cores) | 2 |
| Data Management Option | 1 |
| Tableau Online Multi-Site Support To allow for 4 Sites in Tableau Online | 1 |

# NON-MANDATORY AND OPTIONAL DELIVERABLES (SUPPLIER RESPONSIBILITIES)

## Limit contract to entire Tableau Product set.

# POTENTIAL, ACTUAL OR EXPECTED DELIVERY VOLUMES (IF APPLICABLE)

## Current Licence Usage

* + 1. This request combines existing usage under the CO Digital Tableau Shared Service, a standalone contract owned by Government People Group used for the GRID digital analysis platform and a contract owned by IBCA.
		2. The contracts are being combined in this request to reduce government Buyer to confirmadministration costs and gain access to additional volume discounts.
	1. CO Digital Tableau Shared Service
		1. At present 17 business units use Tableau licences under the current agreement, served from 4 Tableau online sites.
		2. There is one general purpose site for Cabinet Office (CDIO) and 3 dedicated sites serving The National Situation Centre (SitCen), Infrastructure and Projects Authority (IPA) and Government Communication Services (GCS).

# LOCATION

* 1. [The location of the Services will be online. Occasional face-to-face meetings will be attended by mutual agreement during the contract term.](#_heading=)
	2. Any travel to the location of the face-to-face meetings will be at the supplier's own expense.

# BUYER RESPONSIBILITIES

## Supporting collective government, helping to ensure the effective development, coordination and implementation of policy.

## Supporting the National Security Council and the Joint Intelligence Organisation, coordinating the government’s response to crises and managing the UK’s cyber security.

## Promoting efficiency and reform across government through innovation, better procurement and project management, and by transforming the delivery of services.

## Promoting the release of government data, and making the way government works more transparent.

## Creating an exceptional Civil Service, improving its capability and effectiveness political and constitutional reform.

# KEY MILESTONES AND DELIVERABLES

* 1. [The following Contract milestones/deliverables shall apply: The contract is required to be in effect by 26-Jul-2025.](#_heading=)
	2. Management Information[/reporting](#_heading=)
	3. [Supplier to run a monthly service review to include](#_heading=)
		1. Report showing licence usages by Tableau site
		2. Financial report
		3. Summary of support tickets and actions taken
		4. User sentiment review
		5. Stakeholder sentiment review

# SUSTAINABILITY AND CARBON NET ZERO

## The supplier must provide details of their sustainability policies, including any net zero commitments when requested throughout the life of the contract.

# SOCIAL VALUE

* 1. The supplier must demonstrate how they will deliver social value throughout the contract, including and not limited to skills development and training, support for disadvantaged underrepresented groups, ethical work practices, and contributions to local community initiatives and wellbeing. Social value delivery will be monitored and reported as part of the contract performance.
	2. Provide details of initiatives supporting local employment or diversity
	3. Provide details of demonstrating action to support health and wellbeing, including physical and mental health, in the contract workforce.
	4. Explain the provisions in place for users with disabilities for using Tableau

# STAFF AND CUSTOMER SERVICE

## The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.

## The Supplier’s staff assigned to the Contract shall have the relevant qualifications and experience (as detailed in the Mandatory Requirements Section) to deliver the Contract to the required standard.

## The Supplier shall ensure that staff understand the Buyer’s vision and objectives and will provide excellent customer service to the Buyer throughout the duration of the Contract.

# CONTINUOUS IMPROVEMENT

## The Supplier will be expected to continually improve the way in which the required services are to be delivered throughout the Contract duration.

## The Supplier should present new ways of working to the Buyer during monthly Contract review meetings.

## Changes to the way in which the Services are to be delivered must be brought to the Buyer’s attention and agreed prior to any changes being implemented.

# SECURITY AND CONFIDENTIALITY REQUIREMENTS

* 1. [Tableau is working to SOX, SOC and ISAE compliance standards. Audit reports are available to demonstrate conformance.](#_heading=)
	2. [Data to be encrypted at rest.](#_heading=)
	3. Cyber Essentials is required along with details of certification.

# PRICING MECHANISM

## All prices are excluding VAT

## All prices are inclusive of expenses, such as travel and subsistence.

# PAYMENT AND INVOICING

## Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.

## Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.

## REDACTED TEXT under FOIA Section 40, Personal Information

* 1. Any invoices not sent to the email address as at 18.3 will not be paid.

# CONTRACT MANAGEMENT AND KEY PERFORMANCE INDICATORS

## The Buyer will measure the quality of the Supplier’s delivery by:

## Quotes for additional licences or services to be provided within 5 business days

## Licences to be provided within 48 hours once the order is agreed by both parties

## Evidence of value added to the Cabinet Office due to knowledge transfer, community events and promotion of best practice. Examples include: webinar sessions focusing on skills, in person Tableau events, highlighting improvements that can be made to our Tableau usage and configuration. These benefits will be captured in narrative form including measurements where possible. These will be reviewed at the monthly service review meeting.

## 19.2 If the reseller does not perform to the expected level then a new reseller can be identified through a procurement process.

19.3 Key Performance Indicators

REDACTED TEXT under FOIA Section 43, Commercial Interests

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